

Dueling Storms: Advancing Consumerism in the Midst of the Pandemic Recovery

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Roadmap

- Re-Examining Patient Care
- The Impact of COVID + Consumerism
- The Hybridization of Patient Experience
- Post-Pandemic Strategy

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Re-Examining Patient Care

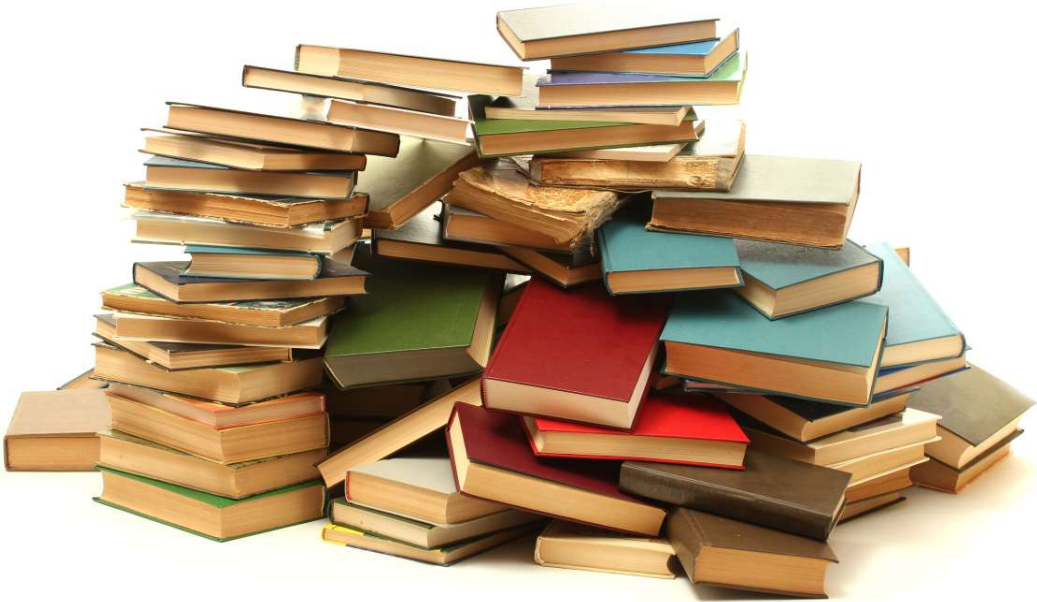
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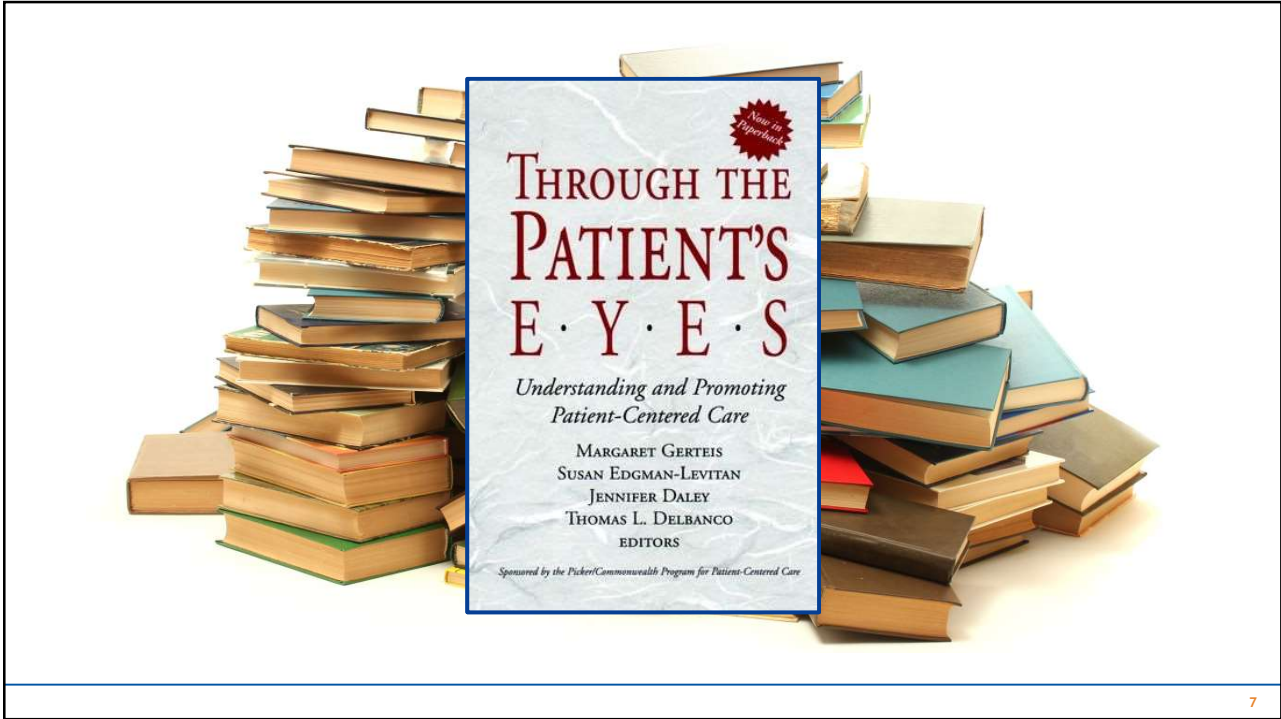
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The Genesis of Patient-Centered Care





Eight Dimensions of Patient-Centered Care

Eight Dimensions of Patient-Centered Care
Respect for patients' values, preferences and expressed needs
Coordination and integration of care
Information, communication, and education
Physical comfort
Emotional support and alleviation of fear and anxiety
Involvement of family and friends
Continuity and transition
Access to care

Source: The Picker Institute

A Quarter Century of Patient-Centered Care

- The Eight Dimensions grew in popularity
- To doctors: treat the disease *and* the person
- Industry shifted to HCAHPS and public reporting
- The gravel road from volume/fee-for-service to value
- An incredible shift in financial risk to people/families

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**The Governance Institute's Leadership Conference – Hybrid Event
April 19–20, 2021**

What Makes the Healthcare Consumer Tick?

- Consumers have shouldered the growing **burden** of paying more for their healthcare
- As true in any other industry: the more you pay... the more you **expect** in return
- As a result, consumer expectations for healthcare and experiential **frustration** have also grown

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Non-Healthcare Case Example:
Getting Food with a Car Full of Kids

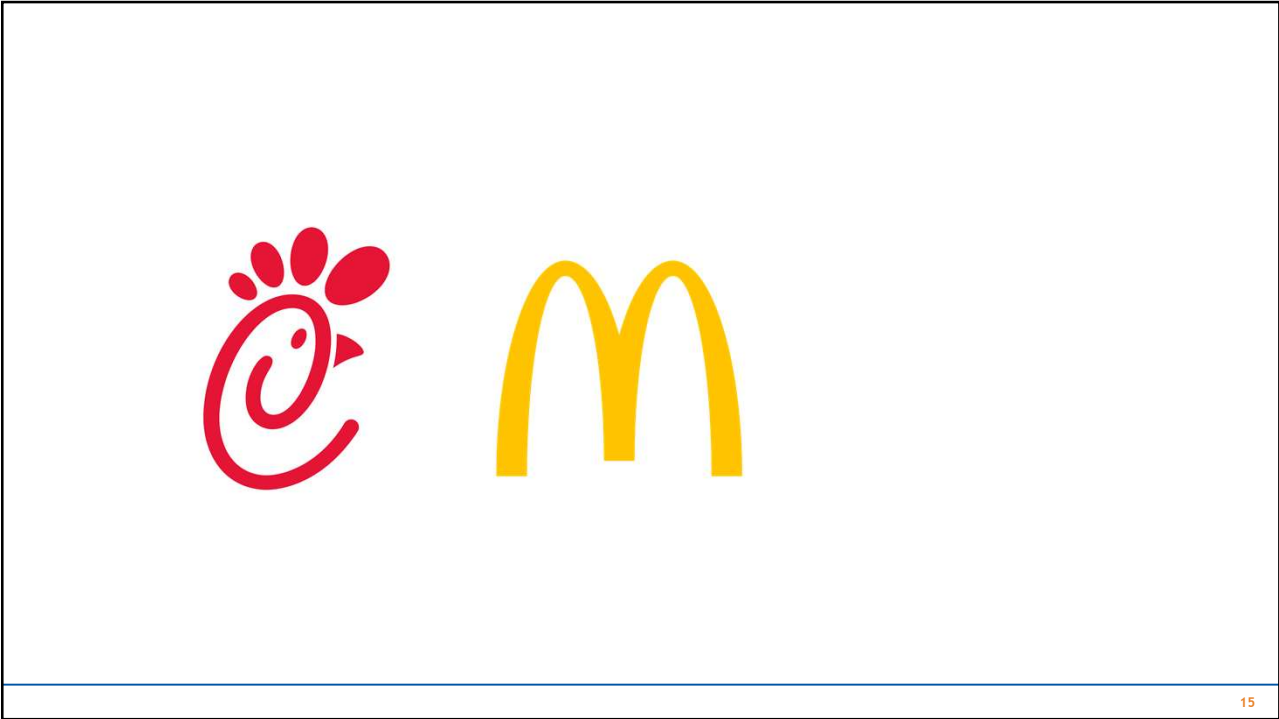


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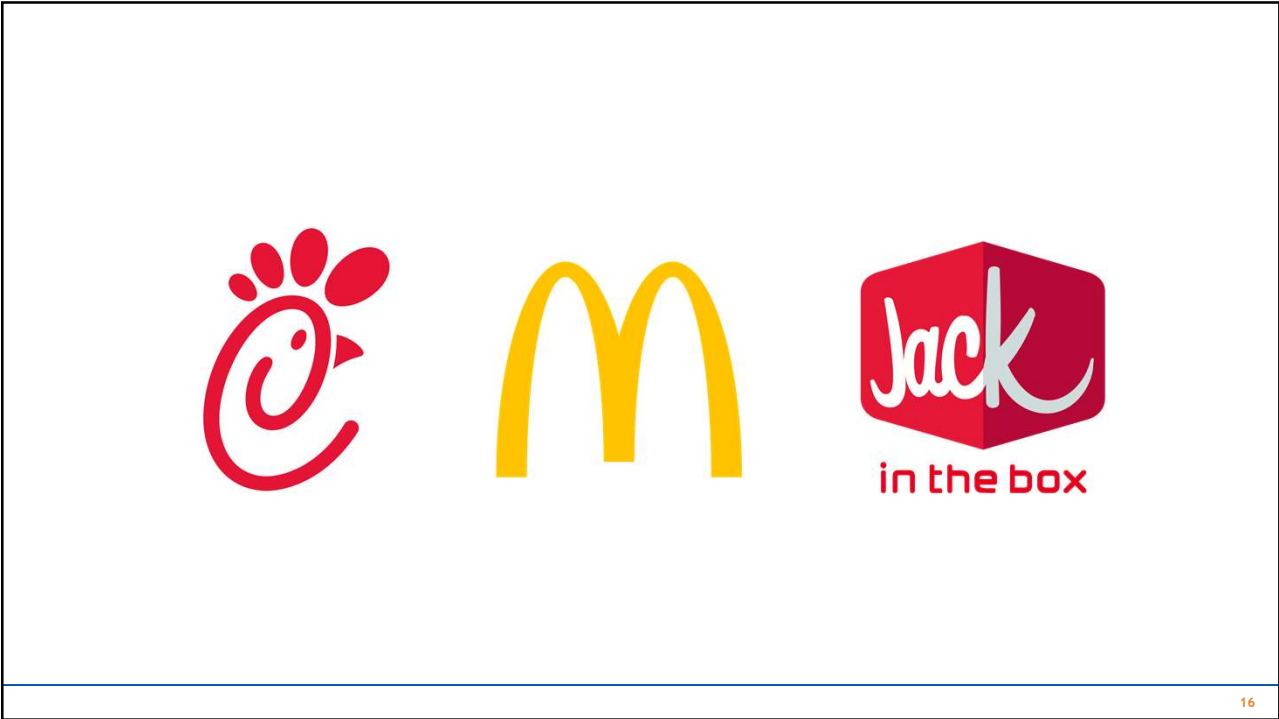


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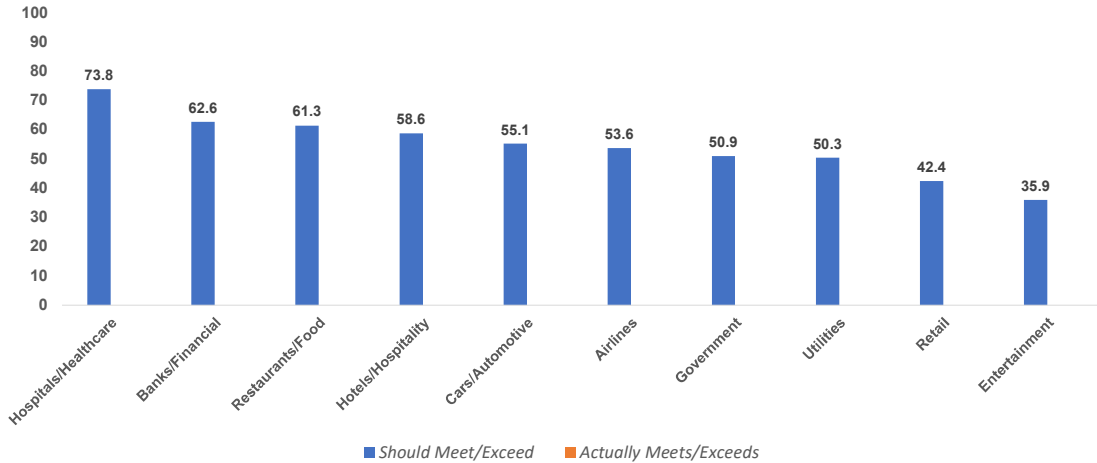


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Expectations of Healthcare vs. Other Industries

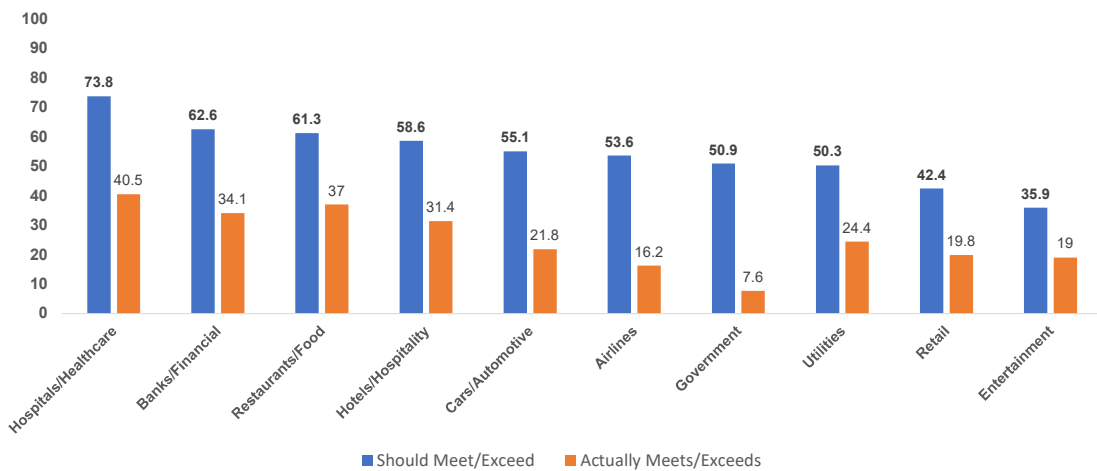


SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845

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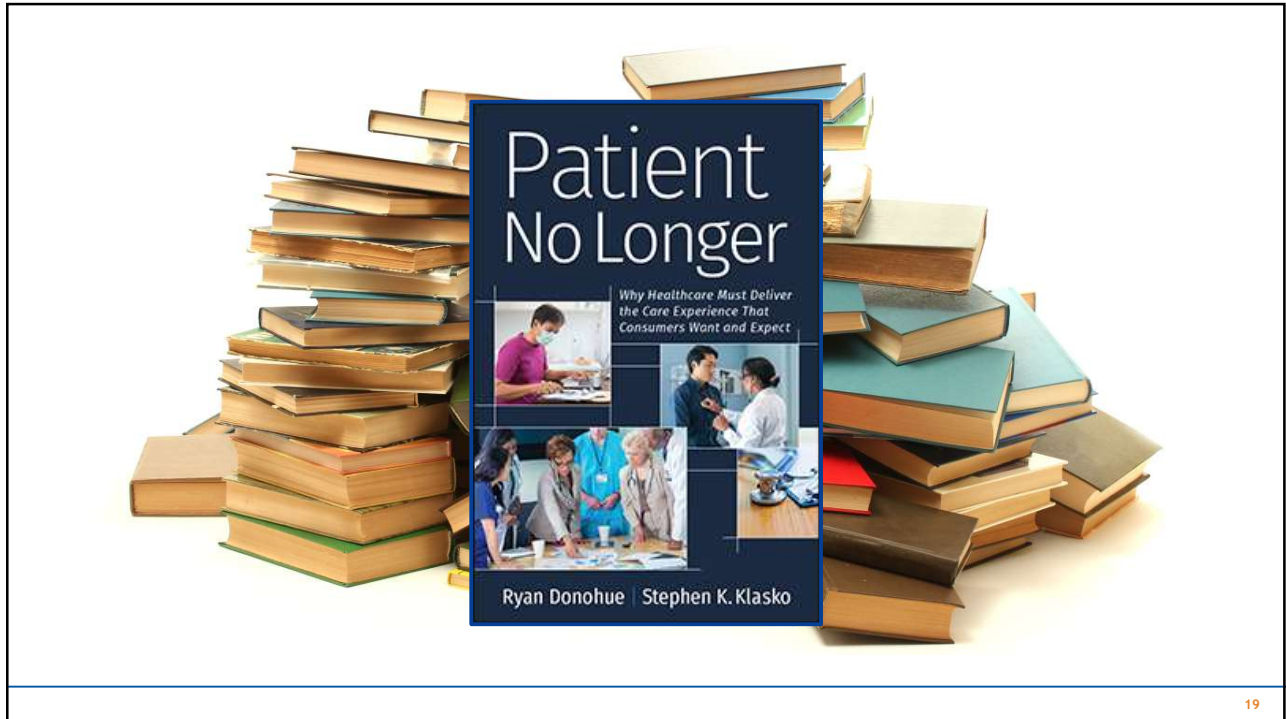
Comparison of 'Should Meet' vs. 'Actually Meets'



SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845

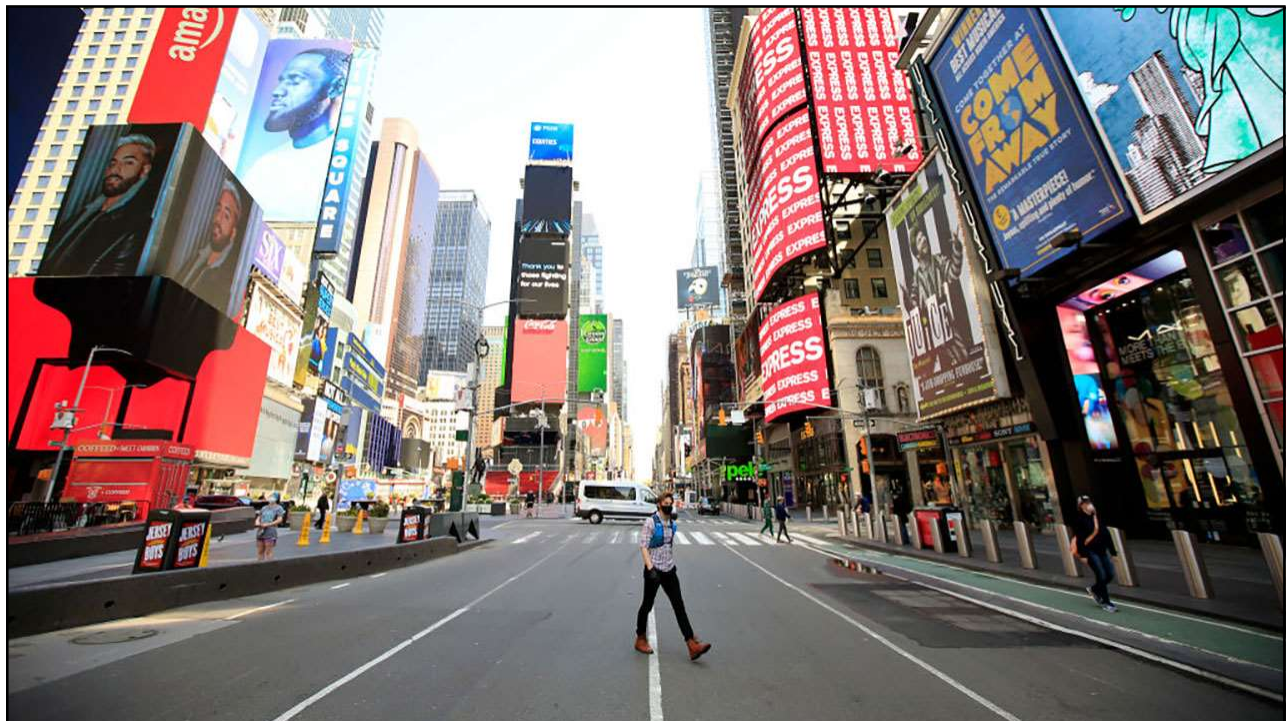
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The Impact of COVID + Consumerism

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NRC Health's study of COVID-19 effects on consumers

- Roughly **half** have delayed care in some form since March
 - Dental, primary and specialty care most likely to be delayed
- 7 in 10 deferrers cited COVID-19 in delaying their treatment
 - Majority of the rest cite various financial concerns
- 1 in 3 have participated in a virtual care visit since March
- Of virtual patients: *more satisfied* than with physical visits

SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, 2020, n size = 2,000

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What Matters Most in the Consumer Care Journey?

Three priorities emerge from asking consumers directly

Access

Start me on a quick, easy path to access the right care at the right time

Engagement

Deliver easy, frictionless experiences that meet my expectations

Value

Don't kill me with the bill – give me context, provide options and be transparent

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Access: Telehealth aka “Return of the House Call”

When it comes to service - especially this year - consumers are now expecting *you* to come to *them*

- **35 percent** used telehealth services in 2020 (15 percent in 2019)
- **74 percent** were satisfied with visit
- **57 percent** are likely to schedule telemedicine in the future
 - 54 percent would see PA/NP
- **8 in 10** employers are now covering telehealth as a benefit



SOURCE: NRC Health's MARKET INSIGHTS study, 2010-2020, average annual n sizes vary from 208 (qual) to 278,824 (quant)

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Engagement: “Systemness” Rules Supreme

- Consumers have grown tired of confusing, disjointed experiences in their journey



- Consumers value unified brands & “systemness”:

- **65 percent** said they were more likely to choose a hospital that is part of a system
- **31 percent** said it makes no difference
- **4 percent** said they were less likely to choose a hospital that is part of a system
- **18 percent** feel its ‘extremely important’ for their *physician* to be affiliated with system



SOURCE: NRC Health's MARKET INSIGHTS study, 2010-2020, average annual n sizes vary from 208 (qual) to 278,824 (quant)

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Value: The After Experience of Paying for Care

- Half of consumers feel a *significant* burden paying for care
- 87% of consumers incur some level of difficulty in trying to understand their healthcare bill(s)
- 65% feel its important to be able to fully understand their bill
- 51% feel its important to receive a single bill
- Many dissatisfied patients describe paying for their care as one of the worst parts of the experience



Source NRC Health's Market Insights special study on price transparency, 2021. n size = 2,008

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How to Reshape Consumer Perception of Healthcare

3 priorities emerge from a mountain of consumer data

Access

Start me on a quick, easy path to access the right care at the right time

Engagement

Deliver easy, frictionless experiences that meet my expectations

Value

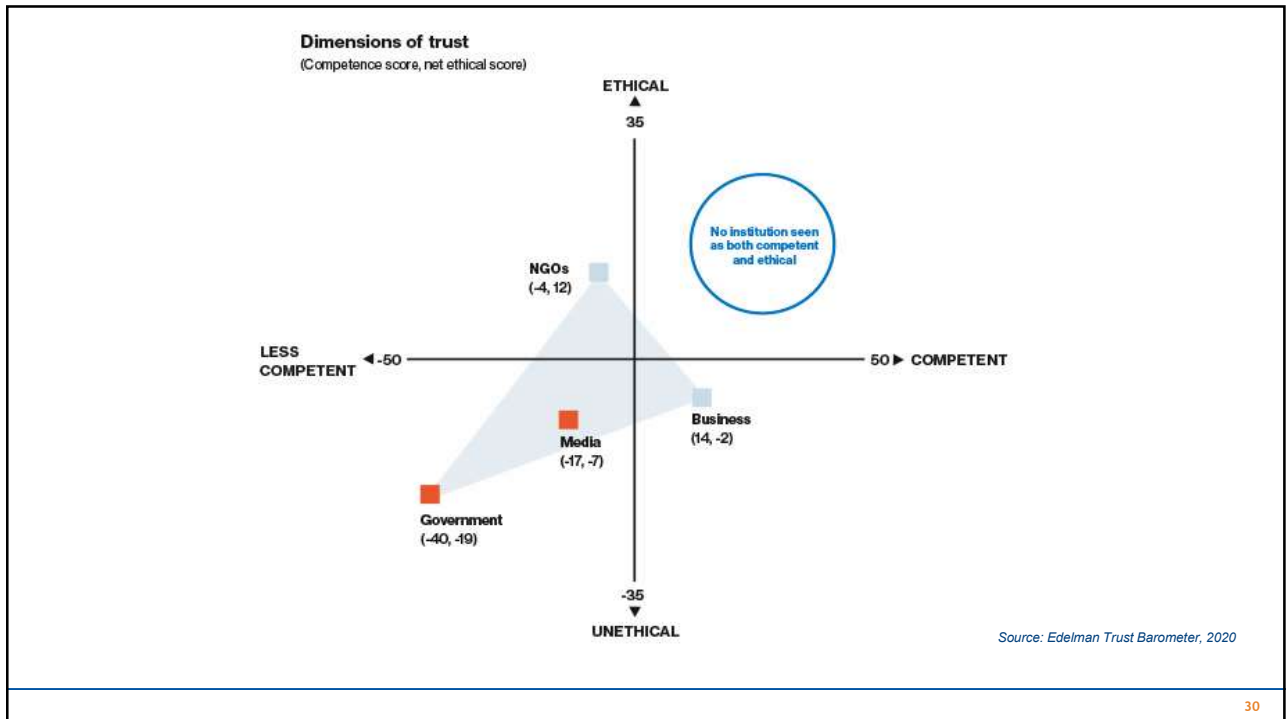
Don't kill me with the bill – give me context, provide options and be transparent

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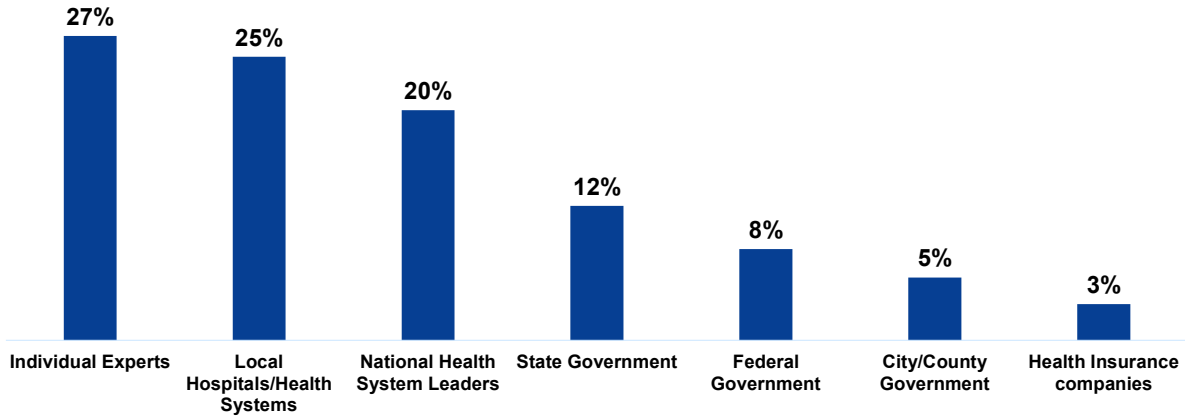


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Who do you trust the most to handle COVID-19?



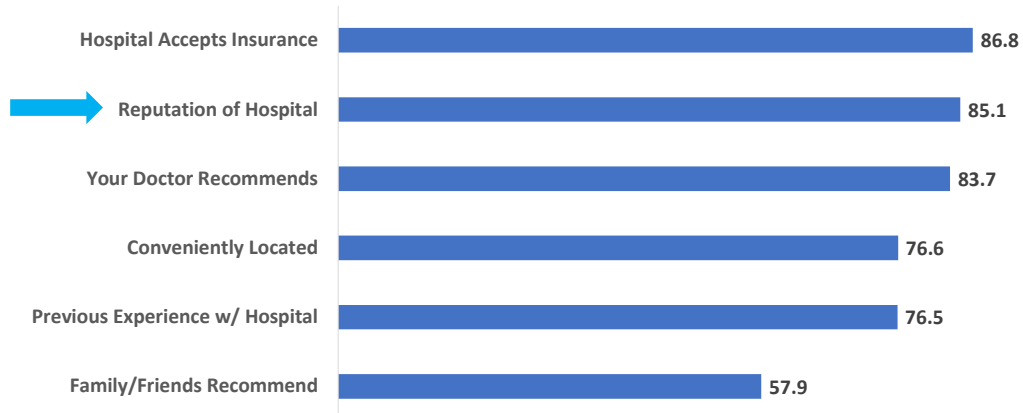
SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, 2020, n size = 21,421

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Reputation is a “Big Three” Selection Factor for Consumers

How important would the following factors be to you when selecting a facility?



SOURCE NRC Health's Market Insights survey of consumers, 2020, national n size = 292,510

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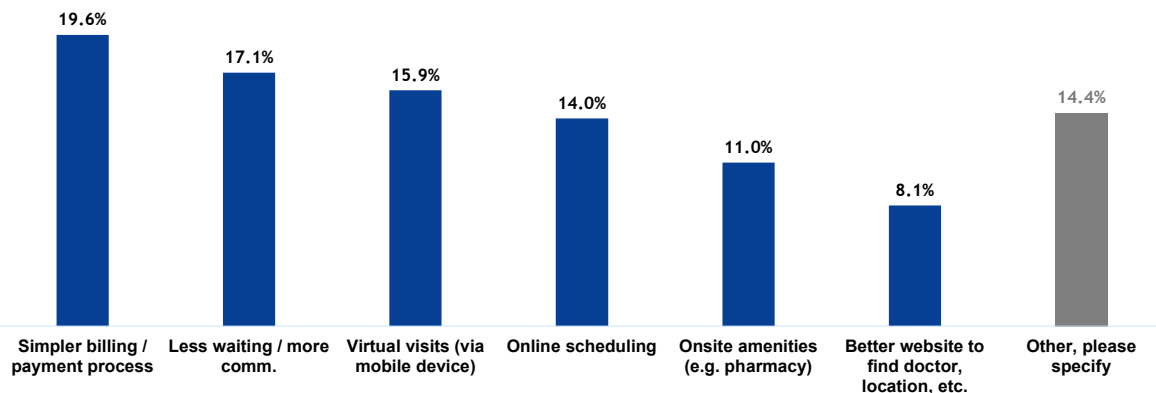
The Hybridization of Patient Experience

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Consumer Wish List for Healthcare (from 2018)

Which improvement should your provider pursue?



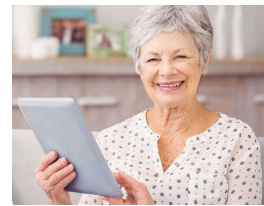
Source: NRC Health's Market Insights consumer survey, nationwide, November-December 2018, n size = 44,159

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Digital Healthcare Experiences ARE Experiences.

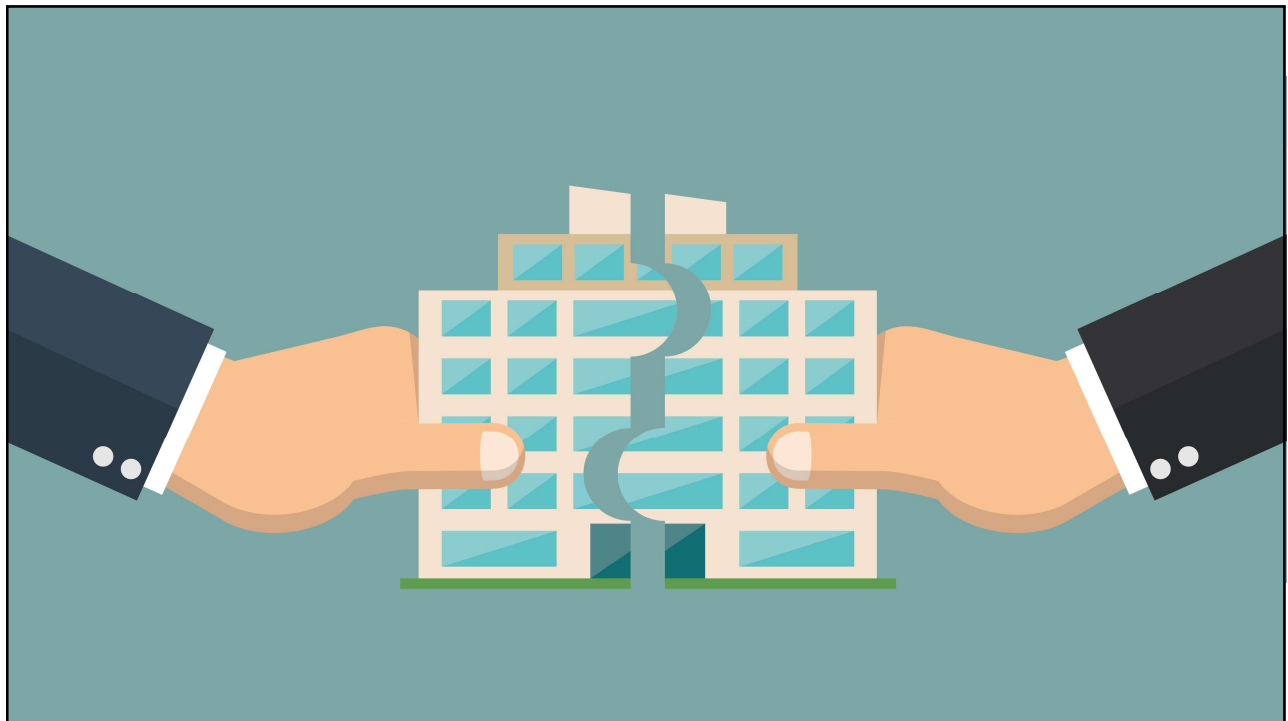
- For consumers, screens are the new door
- In healthcare, consumers are seeing the growing possibilities of online information, education & **experiences**
- Older consumers are more active in digital health:
 - Ave. age of healthcare decision-maker is 48 years young
 - Same age as consumers who use social media for healthcare purposes (49 years young)
 - Roughly half of 65+ are aware of doctor ratings
- Across all age groups, digital info is flourishing



SOURCE: National Research Corporation's MARKET INSIGHTS study, 2010-2020, average annual n sizes vary from 208 (qual) to 278,824 (quant)

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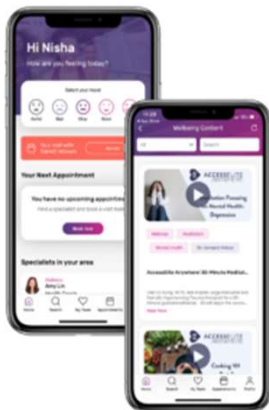
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Hybrid Experience: Case Examples

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AccessElite Health



- Complete healthcare access management
- Built around online scheduling
- Same day appointments available
- One-click booking through the app
- Dedicated chat or phone line before, during or after an appointment

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VIRTUAL WAITING ROOM

Ensure Social Distancing Amid COVID-19

The idea of waiting in a waiting room can be scary. Give patients the peace of mind they're looking for with a virtual waiting room. Our proven solution provides contactless check-in from your parking lot and can be up and running in 24 hours.

FREE PHONE CONSULTATION

One Platform, Multiple Touchpoints

Our solution brings positive, digital experiences to multiple touchpoints in the patient journey.

BEFORE

- Schedule and manage appointments online
- Submit forms before appointments

DURING

- Get in line and check in remotely
- Receive text or email reminders
- View position in line via status boards
- See wait times in real time

AFTER

- Give instant feedback via online surveys
- Receive texts about follow-ups and wellness visits

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BayCare (Tampa, FL) Easy Pass

- Launched in 2017 via physician practice
- Two membership tiers available
- Multiple benefits offered
- Objective: make BayCare services so easy they become second nature and after repeated use loyalty is formed
- Highly positive feedback received so far

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Digital Health as a Relationship Builder

- Consumers want care providers to take a step toward them
- Digital health presents the best opportunity to close the ‘cognitive gap’ consumers experience with healthcare
- Consumers who visited a provider website, social media page or experienced virtual care now consider those on-par with traditional physical patient experiences



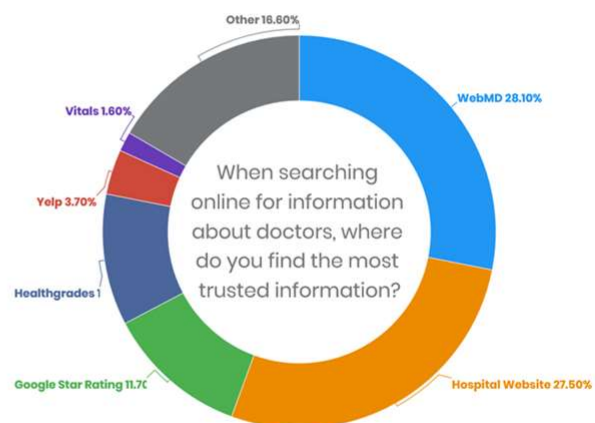
SOURCE: MobiHealth News, August 2020

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Consumers Trust Hospital/Health System Websites

27.5% of Consumers say a **Hospital's Website** is the **Most Trusted** Online Source for Doctor Information



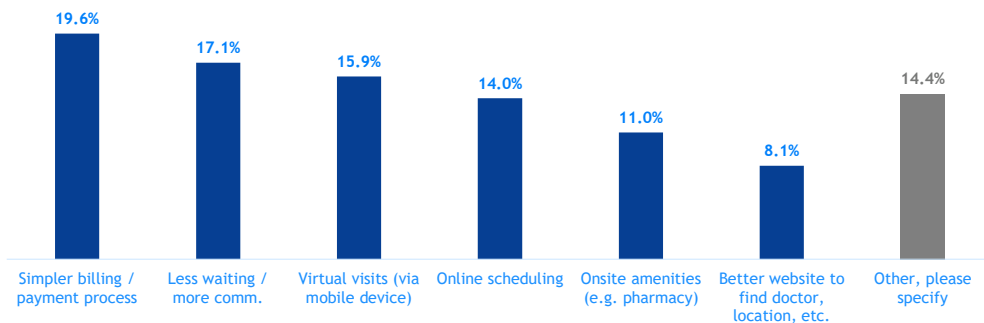
N = 46,962 | 2019 | NRC Health Market Insights National Study

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The Role of Virtual in Consumers “Wish List”

Which improvement should your provider pursue?



Source: NRC Health's Market Insights consumer survey, nationwide, November-December 2018, n size = 44,159

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Post-Pandemic Strategy

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Five Ideas to Advance Consumerism Post-COVID

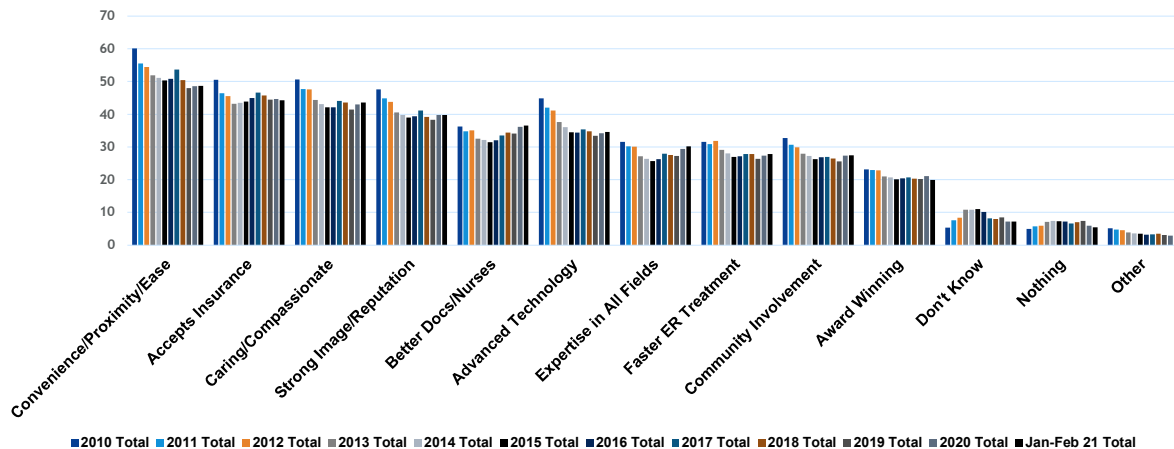
- **Easy win:** select an existing consumer-facing initiative to finish
- **Access Play:** buy/build a product that allows either easier telemedicine, online scheduling, or virtual waiting room
- **Engagement Play:** conduct a total brand audit - including virtual - and ensure there is consistency across all assets
- **Value Play:** post physician ratings/reviews to prove value
- **Future Strategy:** integrate digital INTO the strategic plan

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Stealth Strategy: Creating a Single Point of Difference

What factors stand out in your mind as things that (Top-of-Mind Hospital) does especially well that set(s) it apart from other providers in the area?



SOURCE NRC Health's Market Insights survey of consumers, 2010-2021, national n size = 284,111 (average); 43,023 (2021 only)

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I'm re-visiting what's important.

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I'm re-visiting what's important.

I want healthcare to be different.

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I'm re-visiting what's important.

I want healthcare to be different.

So, what do you have to offer me?
(that no one else can give me?)

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HEALTHCARE WITH NO ADDRESS

Care, like everything else: Digital



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It's all about the Customer Experience

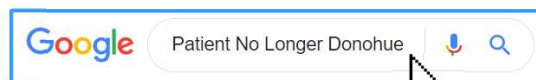
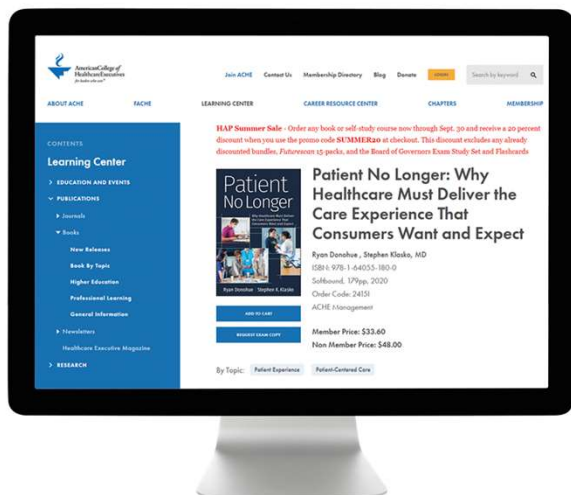
“We think of the Experience as our relationship with you from the time you visit our website or call us to when you arrive at your destination and all points in between”



Gary Kelly
CEO-Southwest Airlines

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